



**SALES MANAGER REFERENCE SHEET**

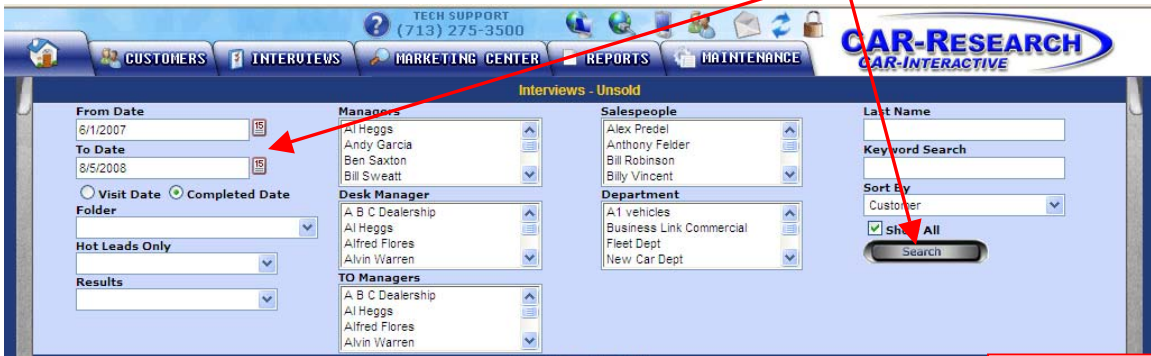
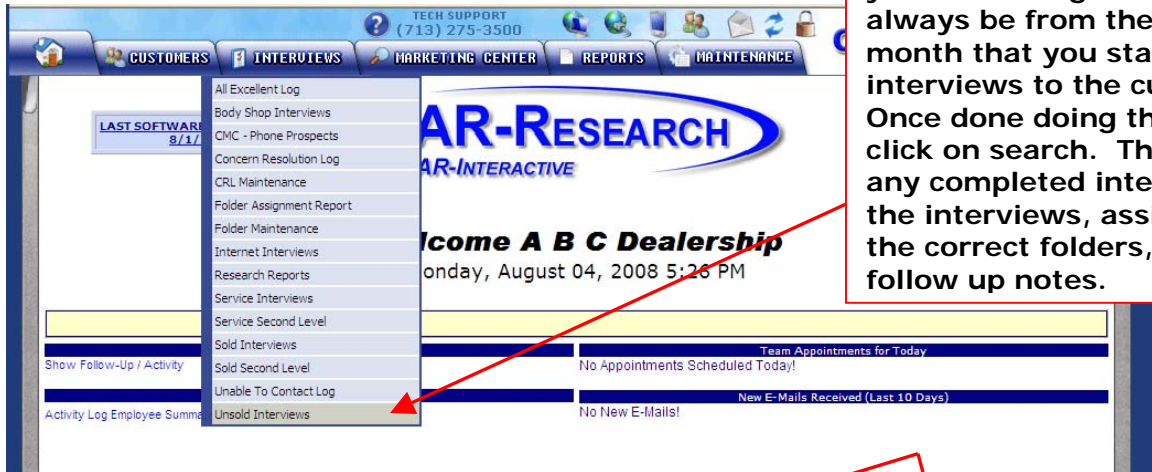
**DEALERSHIP REPORTS**

**CUSTOMER INTERVIEWS**

**SHOWROOM CONTROL MANAGER**

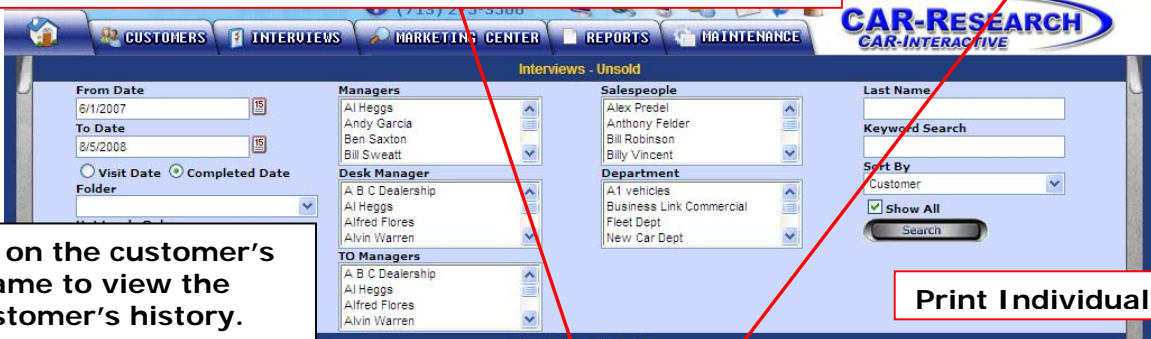
1. Utilize and maintain the Interview Section. These can make a month if utilized properly. **THIS IS ONE OF THE MOST CRUCIAL ASPECTS OF CAR RESEARCH.** To read the interviews you will click on the Interview tab and select Unsold Interviews. Set the date range from \_\_\_/\_\_\_/\_\_\_ to the current date. Select your department or your folder and then click on search. This will pull up all new and working interviews.
2. You will then click on the Customers tab > Showroom Control Manager. Then you can check appointments, Internet leads, and traffic.
3. **ALL customers are to be logged by every salesperson-everyone.** Make sure that they are scanning as many licenses as possible. This is not an option. Salespeople should not be able to sell a car, get paid on a deal, have protection, or work a deal, unless the customer is in the system...this should go for everyone.
4. **DO NOT START A DEAL WITHOUT THE PRINTED WORKSHEET**
5. Make salespeople log **ALL PHONE CALLS INTO THE SYSTEM.** Not just appointments-incoming calls, follow-up calls, etc.
6. Utilize and monitor the Daily/Weekly/Monthly Reports for the Owner/General Manager and all Sales Managers. These can be setup to follow any criteria.
  - **Yesterdays Traffic.** Go to Reports and select Showroom Control Log. Date for Yesterday or any date range, especially if you are utilizing the HOT prospect feature, and print. You may also go to the Customers Tab and select Showroom Control Manager...you will then click on the Time Bar and change the Date Range to the day you want to review.
  - **Appointment Reports** for today or any day. You can do this in a few ways. The Appointment Reconciliation is located by clicking on the Customers tab, or the Showroom Control Manager screen (which is recommended). Gain access to Appointment Reports by going to the Reports tab and select the desired report from the appointment report section.
  - **Follow-Up and Percentages.** This is located on the managers Splash Page when you log in or by going to the Reports tab > Salesperson Reports > Follow Up percentages and setting the desired date range.
  - **Phone Call Activity Reports** You can run these weekly or any date range. Simply go to the Reports tab and access the BDC or Salesperson reporting section. You can also monitor all calls being done from your Splash Page (Home Page).
  - **Salesperson OTDB Report.** Usually run weekly, monthly or any date range. You do this by going to the reports go to salesperson reports and then select OTDB report
  - **Sourcing Report** to track advertising. Reports tab and select sourcing report. Select any desired date range.
  - **Research Reports** are based on Interviews made by CAR Research...compare them to the numbers you have input into the system. These are located in the interview section. This is a great way to monitor what the store is saying and what your customers are saying.
7. Use the Work-a-Deal Feature.
8. Push deals to DMS to load your F & I screens. You will need to do this at least 25 times in New Cars and 25 times in Pre-Owned to ensure that all the field population is working properly.

To read the interviews you go to the Interview Tab and select Unsold Interviews. Once you have selected this, you will enter your date range and this should always be from the first of the month that you started receiving interviews to the current date. Once done doing this then you click on search. This will pull up any completed interviews. Read the interviews, assign them to the correct folders, and add follow up notes.



Settings for Internet Explorer to Print Interviews  
This is a one-time only setting. Click here if this is your first time printing interviews.

Print all of your interviews here.



Click on the customer's name to view the customer's history.

Print Individual Interview

Indicates a Hot Lead

View all of your interviews here.

View Individual Interview

EventID	Customer	Visit Date	Completed Date	Salesperson	Folder	Assigned
9429148	United Casing Inc	11/19/2007	11/23/2007 11:12:29 AM	Michael Moten	Test	8/5/2008
9272955	8870692, Jennifer	6/23/2007	6/25/2007 6:12:43 PM	Don Mccastin	SOLD - PROSPECT FOLLOW UP	7/7/2007
9462940	Abate, Jeffrey	12/8/2007	12/12/2007 10:47:10 AM	David White	NEW CARS HOT PROSPECT	12/13/2007
9460078	Abemahny, Margaret	12/5/2007	12/7/2007 6:31:59 PM	Cassandra Elles	FINANCE ISSUES	12/12/2007
9373687	Abraham, Anne	9/28/2007	10/1/2007 12:23:52 PM	Paul Premazon	BOUGHT ELSEWHERE	10/26/2007
9302920	Abraham, Curtis	7/28/2007	7/31/2007 4:24:44 PM	Stephen Miller	OUT OF THE MARKET	8/9/2007

Select the desired folder...

...add notes...

...Mark Completed...

...Save to have notes appear here... Then click next to move to the next interview after your save.

Email the interview to another active employee...or add an additional email outside of CAR Research...you should get this message after you hit 'Send Email'.

CAR-Interview has been sent!

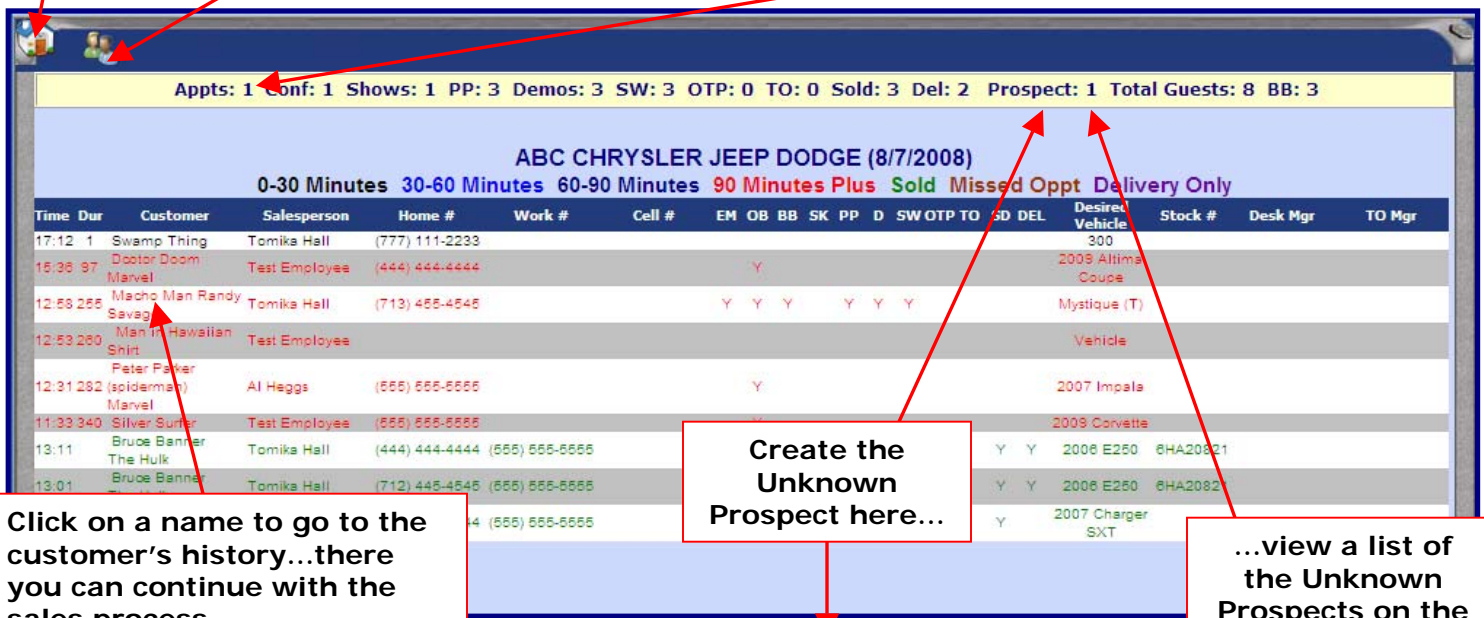
This is the Showroom Control Manager screen. Managers must select the steps to the sale and designate the T.O. Manager and the Desk Manager. All deals must be finalized when the customers leaves.



Splash Page

New Showroom Guest Entry

Go to Appointments

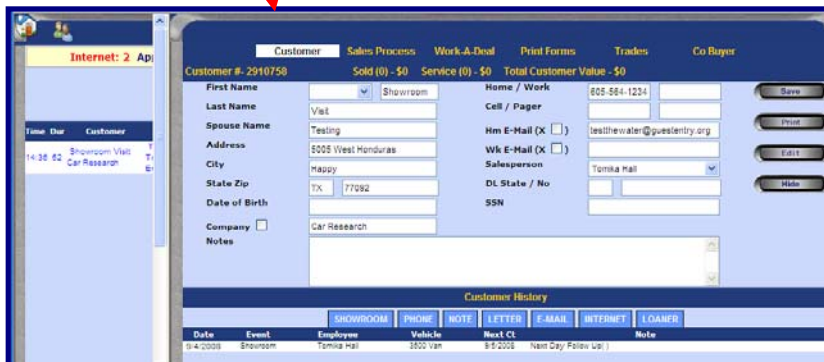


Click on a name to go to the customer's history...there you can continue with the sales process...

Create the Unknown Prospect here...

...view a list of the Unknown Prospects on the showroom floor...

Time	Salesperson	Description	Department	Customer	Delete
12:53	Test Employee	Man in Hawaiian Shirt	A1 vehicles		



Access the Internet Lead Manager...

Internet: 2 Appts: 0 Conf: 0 Shows: 0 PP: 1 Demos: 1 SW: 1 OTP: 0 TO: 0 Sold: 0 Del: 0 Prospect: 0 Total Guests: 1 BB: 0

ABC CHRYSLER JEEP DODGE (9/4/2008)

0-30 Minutes 30-60 Minutes 60-90 Minutes 90 Minutes Plus Sold Missed Oppt Delivery Only

Time	Dur	Customer	Salesperson	Home #	Work #	Cell #	EM	OB	BB	SK	PP	D	SW	OTP	TO	SD	DEL	Desired Vehicle	Stock #	Desk Mgr	TO Mgr
14:38	0	Showroom Visit Car Research	Tomika Hall Tomika's Test Employee	(805) 564-1234			Y				Y	Y	Y					2500 Van		A B C Dealership	

Change the display of the Showroom Control Manager

Click on the Time to go to the Sales Process screen.

Click on the Duration amount to go to the Work-A-Deal screen.

Showroom Control Admin

Time1\*  
60

Time2\*  
120

Time3\*  
180

Department  
A1 vehicles  
Business Link Commercial  
Fleet Dept  
New Car Dept

Desk Manager  
Al Hepps  
Andy Garcia  
Ben Saxton  
Bill Sweatt

Show All

Display  
Show All Events

Date  
8/7/2008

Save

\* Required Information